

HESTON & HESTON

New Client Data/Confidential

Please take a moment to complete the following information. This information will enable us to assist you and to comply with applicable State Bar rules and our insurance requirements. All such information is maintained in strict confidence. **In order to meet with an attorney all information must be provided.**

Your full name: _____ Today's Date _____
Date of birth: _____ Soc. Sec. No.: _____
Marital status: Single Married Separated Divorced Widowed

Your Address: Street: _____ Apt.: _____
City: _____ State: _____ Zip: _____
Your address for correspondence and billing if different from address above):
Street: _____ Apt.: _____
City: _____ State: _____ Zip: _____
Phone: Home: (____) _____ Work (____) _____
Cell phone: (____) _____ Preferred Contact: Home Work Cell
FAX: (____) _____ Is the FAX confidential? Yes No
E-mail address: _____ Is the E-mail confidential? Yes No

Your Employer's Name: _____
Occupation or Profession: _____ Job Title: _____

If married, Spouse's full name: _____
Date of birth: _____ Soc. Sec. No.: _____
If Spouse's contact data is same, check here: Yes If not, include differing data below.
Street: _____ Apt.: _____
City: _____ State: _____ Zip: _____
Phone: Home: (____) _____ Work (____) _____
Cell phone: (____) _____ Preferred Contact: Home Work Cell
FAX: (____) _____ Is the FAX confidential? Yes No
E-mail address: _____ Is the E-mail confidential? Yes No

Spouse's Employer's Name: _____
Occupation or Profession: _____ Job Title: _____

Please check below to indicate all types of legal assistance and/or legal advice you are seeking:

- Divorce, or other family law issue
- Bankruptcy, Debt Consolidation and/or Tax Debt Problems
- Business
- Estate Planning/Wills
- Other (describe briefly): _____

How were you directed to Heston & Heston? Acknowledging referrals is important to us. Please assist us by indicating below:

- Another attorney (name): _____
- Another client (name): _____
- Yellow Pages - Please indicate name of directory: _____
- Internet/Web - Website (if known): _____
- Other: _____

Please provide the following information regarding a person who can reach you in an emergency:
Name: _____ Relationship: _____
Street: _____ Apt.: _____
City: _____ State: _____ Zip: _____
Telephone: Home (____) _____ Work (____) _____

LIMITED SCOPE OF LEGAL CONSULTATION

The limited purpose of a legal consultation is to gather information regarding the facts concerning your situation or particular legal problem, and to advise you with regard to your rights and potential avenues of recourse and relief.

As a result of such consultation, no on-going attorney-client relationship shall be created or otherwise exist between Client(s) and Heston & Heston, or any attorney associated with Heston & Heston. By consulting with Client(s), Heston & Heston does **not** undertake any further obligations beyond the limited scope of the consultation, and specifically does not undertake to represent Client(s) in pending or proposed litigation or other legal proceedings, to research any legal issues discussed, advise Client(s) if there are subsequent changes in the law that may have altered an opinion or advice given during the consultation, or take any further actions on behalf of Client(s).

Should Client(s) seek to retain the services of Heston & Heston to perform such additional legal services, Client(s) shall be required to enter into a separate written Retainer Agreement in accordance with the applicable provisions of the California Business and Professions Code.

By meeting with Client(s) in consultation, Heston & Heston in no way promises, represents or otherwise agrees that it will accept representation of Client(s), nor that it will enter into a Retainer Agreement with Client(s). Heston & Heston expressly reserves the right to decline to represent Client(s) or to perform further legal services on behalf of Client(s).

Please be advised that any originals or copies of correspondence, financial statements, loan applications, tax returns, account statements, bills, pay stubs or other documentation which you may provide to Heston & Heston in conjunction with your consultation, or representation in the event our services are retained, may be disposed of or otherwise destroyed without further notice. Accordingly, you should not provide Heston & Heston with any original documents for which you do not maintain duplicate copies.

I have read the foregoing policy and agree to such terms. Today's Date: _____

Client Signature

Client Signature